



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Liquor Store Order Technician

Job Code Title

Administrative Assistant VI

Pay Band

4a

Job Code Number

436114

Liquor Control Division

Liquor Distribution Unit

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Liquor Control Division administers the state's Alcoholic Beverage Code which governs the control, sale, and distribution of alcoholic beverages. The division provides customer service with a focus on public safety to ensure a safe, orderly, and regulated system for the convenient distribution and responsible consumption of alcoholic beverages. The Liquor Control Division includes the Administrative Team, Liquor Distribution Unit, and Liquor Licensing Bureau. The Liquor Distribution Bureau manages state wholesale liquor operations including warehouse shipping and receiving, accounts receivable and payable, inventory management, liquor order processing, agency contract management, and customer service.

Job Responsibilities

The Liquor Store Order Technician provides support to agency liquor stores including processing liquor store orders, sending out informational packets, maintaining informational systems to ensure efficiency and proper response time for all orders and deliveries, and verifying and processing invoices. The incumbent provides a range of administrative services to support ongoing office operations and activities such as reception, supply ordering, and mail distribution. The position reports to the Liquor Distribution Unit Manager and does not supervise other staff.

• Liquor Store Order and Store Support 60%

1. Receives orders from agency liquor stores through various methods tailored to specific agency liquor stores. Orders are received as faxes, spreadsheets, and text documents that must be processed according to format and the ordering store to ensure accuracy. Reviews the information and compares it to the specific store's sales history. Contacts the store owner if the order looks questionable or changes the order to make sense.
2. Confirms orders by communicating with agency store owners regarding the availability of products ordered, possible substitutions if a product is unavailable, and delivery updates.
3. Updates orders with changes based on information provided in the confirmation and communications from agency store owners. Uploads finalized orders to generate pick lists and invoices. Reviews the progress of all orders and resolves problems to ensure customer satisfaction.

4. Maintains procedures for processing agency liquor store orders, bar sales reports, freight payment reconciliation, and other necessary duties. Reconciles agency liquor store sales orders, bar sales reports, freight payments, and other reports to maintain internal procedures and ensure accurate billing and payments. Reviews internal database reports and researches transaction details regarding discrepancies as they apply to specific stores. Contacts stores to ensure they submit timely bar sales reports. Processes the invoicing for freight payments to the transport company.
5. Verifies and generates freight payments. Tracks down and resolves issues with freight charges.
6. Looks up and verifies product specifications, prices, sales histories, and other pertinent information to answer requests from agency liquor stores using the warehouse management system.
7. Assembles daily store packets for shipments (invoices and report of account status) and quarterly liquor distribution forms (order forms and bar sales forms) that are specific to each liquor store based on location and sales history.
8. Has systems level responsibility for maintaining electronic and manual records systems. Tracks the inventory to make sure that liquor stores get what they need; compiles and stores data in databases and files; generates standard reports; and provides records.
9. Tests new processing or system changes and updates that affect liquor order processing to ensure the system continues to function accurately. The warehouse management system is an integrated system and applications such as the reader for faxed orders operate on a different platform. This position is responsible for tracking, testing, and making recommendations for changes that will improve operations and customer service.
10. Advises and trains liquor store agents on the proper format (spreadsheet, text document, or hard copy) for submitting liquor orders. Writes and maintains a desktop instruction manual that tracks problems and solutions and other information regarding operational requirements and system changes.
11. Maintains and updates various forms, templates, references, and other documents to provide complete and concise tools for recording, tracking, and reporting operational and program information. This may include receiving, reviewing, and compiling standardized forms such as surveys, applications, orders, and online requests.
12. Updates agent records to ensure store agents are current on insurance policies.

- **Administrative Support 35%**

1. Prepares letters, reports, forms, or other material from rough draft or corrected copy using the appropriate computer software functions to draft, format, and finalize documents.
2. Responds to general inquiries from office staff, liquor stores' agents, and visitors by locating and compiling general program information. Provides other assistance as necessary.
3. Maintains office supply and equipment inventories by identifying needs, preparing supply orders, and stocking supplies according to established purchasing and requisition policies and procedures. Maintains databases and manual files with current information, generating standard reports, and providing records as requested.
4. Sorts; routes; and distributes mail, facsimiles, and electronic messages to ensure timely delivery of correspondences and materials. Coordinates express shipments (Federal Express), bulk mailings, and other delivery services with staff and service providers. Prioritizes mail to ensure that urgent incoming and outgoing mail is processed accordingly.
5. Assists the purchasing agent to enter freight manifests into the warehouse management system and provide the information to the warehouse crew to check actual freight off against when unloading. This position is the backup for the bureau's purchasing agent in making changes to the warehouse management system.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.

Job Requirements

To perform successfully as a liquor store order technician, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to learn new software systems, especially warehouse or inventory management systems. Skills in multi-tasking; paying attention to details and accuracy; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; compiling and analyzing data from multiple sources; reviewing technical documents; following written and oral directions and instructions; and using word processing, spreadsheet, and database applications are required. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of office operations; business communications; records management; customer service standards; and word processing, database, and spreadsheet applications.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is one year of job-related vocational training in business administration and using computer software and two years of job-related work experience.
 - Work experience should be made up of working in computer applications, especially warehouse management or inventory tracking systems.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to workload, deadlines, time constraints, and nature of contacts. At times, the incumbent will deal with angry and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use and being seated for extended periods of time. The incumbent may spend considerable time on the phone. Work hours may exceed 40 hours per week from time to time. Working in the liquor warehouse may involve hazardous, dusty or noisy areas. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Shauna Helfert, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resource Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____